



Judicial Staff Education Committee (JSEC)

July 8, 2016 Minutes

Members Present: Alexis Allen, Carla Boatner (Vice Chair), Rafaela de Loera (Chair), Susan Holliefield, Joe Legander, Kathy Schaben, Catherine Soileau, Christi Weigand

Members Present by Phone: JT Hilton, Suzette Williams

Members Absent: MaryJane Abril, Elaine Bridschge, Adam Gage, Gretchen Maynard, Wendy Perkins, Marla Randall

Staff Present: Jeff Schrade, Gabe Goltz, Tony Cornay, Renu Sapra, Harriet Ramsbacher

1. Call to Order and Administrative Business:

- a. Meeting called to order at 10:12am.
- b. Members introduced themselves.

2. Review/Approval of Minutes:

- a. Minutes from the 3/29/16 meeting were approved as submitted.

3. Chair/Vice Chair Updates:

- a. *COJET Committee Report* – Carla Boatner reviewed the March 31 meeting. Items included:
 - i. Discussion centered on creating new and more advanced faculty skills training in order to strengthen experienced faculty.
 - ii. Examining a code change for faculty background continued from the December meeting to ensure that educational programs are fair and balanced and not geared toward specific interest groups. Education

Services (ESD) offered to add language to code to assist in ensuring fair and balanced programs. Since Training Coordinators (TCs) are responsible for granting accreditation to new programs, it was thought this might make that job easier. After much discussion, the committee decided this was an ethical issue rather than a code issue and tabled the issue indefinitely.

- iii. COJET compliance - for 2015, the judicial branch was 99.78% compliant.
- iv. A document was provided to committee members for review on how quorum and proxy issues should be handled. Mr. Schrade emphasized this was a clean-up measure only in an effort to provide clarity and to bring the COJET committee in line with all other Supreme Court committees.
- v. From the standing committee reports, it was noted that Judicial Conference details are being finalized; CLIA will be offering AZ Court Supervisor and AZ Court Manager classes in Tucson for the first time; CLIA is also working on providing future training classes jointly for Presiding Judges (PJ) and Court Administrators (CA) as an executive unit; COPE reported new curriculum and new elective offerings for Probation Officer Certification (POC) training.

4. Regional/Local Updates and Subcommittee Reports:

- a. *Arizona Courts Association (ACA)* – Since Elaine Bridschge was not present there was no report from the ACA.
- b. *Court Services Division (CSD)* – Christi Weigand reported that there were two major rollouts in the Court Services (CSD) division involving a new contract with TransUnion which will provide enhanced record search capabilities. All users are required to attend training on this change. The second rollout involved a new FARE website upgrade for reconciling web and IVR FARE payments. Court Operations participated in the ACS Capstone program in May by providing training on accountability and Minimum Accounting Standards (MAS). Court Programs worked with two major committees (Fair Justice for All Task Force and the Court Security Standards Committee) and noted that for both committee's work a large educational component is anticipated.
- c. *Joint Council on Court Education (JCCE)* – Suzette Williams reported that Pima County's annual June Jam, held on June 22 – 24, was extremely successful. There were 29 training sessions and 62.75 hours of approved COJET training 830 participants from both inside and outside of Pima County attended and provided good feedback to organizers.
- d. *Local Updates* -
 - 1. Mr. Legander reported on the annual court clerk's conference in June. Over 50 classes were provided in 2 and ½ days for 300+ participants. All the training was very well received. The annual supervisor's retreat was also successful. Training topics

included a class on multi-generational issues taught by Mr. Goltz. The massive Cornerstone project (Maricopa County's new Learning Management System) is still in the process of being implemented. There have been multiple issues with the conversion so it has been slow going. A wonderful new active shooter training was created by former policeman and new employee TJ Alioto that has gotten rave reviews. Superior Court is continuing to work on interactive programs for court clerks. Contract workers may be brought in when new projects are on the horizon. He gave an open invitation if anyone is interested in open media development. Ms. de Loera reported that they have the technical equipment but no one trained to use it. One of her Training Coordinators is coming to Phoenix for the Maricopa County Justice Court training at GCU and she will put him in touch with Joe.

2. Susan Holliefield reported that Gilbert Municipal Court held a day of training on June 16. She created a movie marathon flyer using a Harkins theater-type approach. Participants were able to pick 'movie' times on the different legends of the judiciary. She provided snacks and a good time was had by all participants. She would like to use this approach in the future as it was so successful. They had another one day court conference called MVD Medley on June 22 where MVD provided some good tips on how to answer confusing questions that clerks deal with daily. Cat Rambo also taught a class on managing conflict with emotional intelligence which was excellent. She is interested in continuing to reach out to local and/or smaller courts to help provide COJET training for their employees. She also is looking to talk to anyone who has some good security officer training.
3. Mr. Goltz reminded everyone of the upcoming Maricopa County Justice Court training at Grand Canyon University (GCU) in 2 weeks. It is an ambitious three day program with a huge agenda of soft skill topics and technical classes. It is open to statewide participation.
4. Catherine Soileau reported that Maricopa County Superior Court had a very successful staff training in June focused on team building. The staff loved it, and they decided to incorporate some sort of team building activity into their training each year. They are also working closely with Mesa Municipal Court and Glendale City Court on mental health in-processing. They have also been invited to Goodyear City Court on August 5 to train on Rule 11 and mental health issues.
5. Ms. Boatner reported that Chandler Municipal Court is continuing to have Tony Cornay teach implicit bias training which is mandatory for all City of Chandler employees. They have been experiencing a high staff turnover so she is hoping the

two final new employees will be on board by July 25. Mr. Cornay will be teaching the next day. Some of her staff attended the one day Gilbert training on June 22. She reported on the City of Chandler customer connection program which is an initiative to enhance the level of customer service the city is providing. One of the initiatives is to have all employees update their voicemail each day so as to provide a more personalized experience for them.

6. JT Hilton reported that the IT team has been testing on Windows 10. Some counties have been converted and they are looking to convert the rest of the state soon. Windows 10 seems fairly stable and good. There will be monthly updates and then a yearly update in August with yearly updates thereafter.
7. Alexis Allen reported that Tony Cornay taught twice at Tempe Municipal Court since the last JSEC meeting and received great feedback. Their court training coordinator worked with the risk management office to put together a video that was Tempe specific. It was a mandatory class for all court personnel that included information on active shooter situations and contact information in case of an emergency.
8. Kathy Schaben – Her county has a new superior court presiding judge as of March who has lots of new ideas for improvement. Consequently qualifications for an existing open position for a new law library coordinator have been upgraded to include a JD degree and a Spanish speaker. They intend to work on community outreach by holding regular monthly clinics on a wide variety of legal topics such as divorce, legal decision making, guardianships for minors and adults as well as set asides for people trying to get their rights back. Ms. de Loera reported that Pima County has been holding court night with attorneys present for people who have legal questions. They have been very successful with over 300+ members of the public attending. The next one will be held in the fall. They plan to continue these nights even if the attendance is low. Ms. Schaben agrees and added they are trying to get the word out in Yuma County about their new clinics. A local court beat reporter will be coming in to do a story on each clinic and they are also advertising on the local radio. The court interpreter certification program is moving forward with three staff interpreters plus Ms. Schaben. Two have already achieved reciprocity and the others are making progress toward that goal. Ms. de Loera gave a tip on holding classes: if you use flyers to advertise your classes, put those little tear off tabs at the bottom so people have a tangible reminder of the date and time to take with them. Ms. de Loera added that Pima County is also holding credentialing for court interpreters. The AZ Court

Interpreters Association will be sponsoring a summer plenary that includes sessions on test preparation.

9. Mr. Goltz – reported on the success of the Judicial Conference. Selected sessions have already been, or will be soon, put up on the Wendell website. The sessions are considered non-live but are COJET accredited for anyone to take. He reminded everyone that Wendell is often overlooked as a source of training for anyone, not just judges. Click on the section called COJET classroom. Please spread the word to all of your employees. During the timeframe of the Judicial Conference week, ESD staffers went all around the state providing training. Mr. Cornay, Renu Sapra and Jennifer Wildeman taught all three days at selected courts. He is excited that more and more courts are providing training during this June period and are doing it better every year. Ms. Holliefield reported that one of her judges loved one of the wellness sessions that was offered. Dan Johnson, a vendor from the Wellness Council (?) in Tucson, has taught a couple of years now on physical wellness. He has modest fees and is available for any court if interested. Mr. Goltz will be glad to help if there are any questions about any of the material or faculty.
10. Ms. Sapra reported for Elaine Brideschge on results from the ACA conference held on April 20 - 22. There were 220 participants representing 76 courts across the state. The conference featured two keynote sessions, twenty-nine breakout sessions and one evening session allowing for 16 hours of COJET training per participant. The plenary topics were on the holocaust and wrongful conviction and were very well received. ESD staffers Mr. Goltz, Mr. Cornay and Ms. Sapra were faculty for this event.

5. Education Services Updates:

- a. *JSEC Membership* – Ms. Sapra reported that there are currently two JSEC committee member vacancies in the Public Member and Appellate Court categories. She will be recruiting two new members so please let her know if you have any suggestions for these openings.
- b. *Summer Trainings Around the State* – Ms. Sapra reported that she reached out to TC's and field trainers around the state to find out about the wonderful trainings are going on in the summer months and to keep up the good work. Eleven courts reported back on training sessions that have already happened or are being planned in the next few months.
- c. *Blended Learning Staff Conference (BLSC) Update* – Ms. Sapra reported that the BLSC is scheduled for 9/22. A save the date memo has already gone out to encourage all courts to hold in-house breakout sessions during that day. The opening plenary features an in-depth history of and background on the Miranda decision. This is the 50th anniversary of the landmark US Supreme

Court decision *Miranda v. Arizona*, which is also the theme for this year's Law Day. Gary Stuart, advisor to the Office of the Dean of the Sandra Day O'Connor College of Law and a practicing attorney, is faculty for this plenary. Chief David Sanders from Pima County will then speak on the day to day relevancy of Miranda in the courts followed by a Q&A session with both faculty. We have asked one of our own JSEC members, Susan Holliefield, to moderate this part of the event. The closing plenary will focus on "*legal advice vs. legal information*," a topic recommended by the AZ Commission on Access to Justice. Ms. Sapra made a copy of this new resource that has been posted on-line for members to review. Ms. Sapra will be traveling around the state to film court staff's responses to legal advice vs. legal information situations and questions. Member Alexis Allen will be facilitating these taped court staff answers to typical pro se defendant questions. Ms. de Loera thanked both Ms. Allen and Ms. Holliefield for stepping up to plate and making this a JSEC event. She is pleased with the choices of topics for this year's BLSC. Mr. Goltz agreed that these topics carry over year to year and are timeless. Ms. Schaben is also very excited about this year's topics. Any member who knows of any training materials ready to be taught is encouraged to reach out to either Ms. Sapra directly or to the TCs to share with their respective groups. All courts are also strongly encouraged to hold as many breakout sessions on this day as they can.

6. JSEC 2016 Action items / Projects:

- a. *Educator Skills Advancement (E-Squared) Update* / Mr. Cornay reported that as much as he enjoys traveling and teaching, no opportunity has arisen yet to use E² for what it was developed for which is to help TCs help local staff to become trainers. He wants to go on the road to figure out what is needed most - teaching or curriculum development. He also wants Ms. Sapra to continue to include blurbs in the TC Newsletter about E² to advise TCs and field trainers that ESD staff is willing and able to assist with their needs. ESD staff trained 26 people in the first E² class, and several of those participants are scheduled to teach at the upcoming GCU training event. If anyone is interested in learning more about E² please let him know. This is another opportunity for us to have consistency across the board in training and to use E² to enhance or focus on what the benchmark is for presenting. Ms. Schaben suggested a possible topic, for the next BLSC: time standards and caseflow in general. Caseflow is the lifeblood of our organization. The topic is very dry and people (judges and staff alike) look at it as just numbers which doesn't resonate with anyone or help to improve the process. She feels it is a question of life stories and what it means to have your case delayed over and over. Maybe this could take the form of webcasts with vignettes from impacted people who describe what it looks like to have justice delayed or appear to be delayed. That tends to resonate more with staff more than numbers. Mr. Legander has run into the same issue with clerks who feel that it is just to process and stamp forms. It is hard to keep people motivated so they are using this same philosophy to new employee

orientation. They are trying to transform numbers into real life situations that impact real people. Call times are tracked and people start to look at calls as strictly numbers and not people. At the end of the day, staff needs to understand this is about justice and people's lives and not just numbers. Ms. Weigand agrees it would be beneficial for court staff who don't always think of the other implications. Dealing with collections is all about numbers, but she has had victims contact her thanking the court for recovering victim restitution. Staff have to realize that it's not just the day to day but big picture. Mr. Legander added that staff who think they helped one person is going to be more satisfied in their job than a clerk who is proud to have processed 500 forms. This also helps with job retention, morale and job satisfaction. It all gets back to caseload interruptions and how one delay in processing a form could have impacts that ripple out to other staff, the judge and the defendant. Mr. Goltz agreed this is a great topic. At the highest level, it could involve wrongful conviction. This is also involves processes and numbers but when victims describe how this impacted their lives it becomes all the more powerful. It makes people sit up and take notice and find ways to help. All training should address this. We need to make training more human.

- b. *Statewide Training / Education Needs Assessment Survey* – Ms. de Loera reported that there seems to be great confusion over how to go about creating a statewide needs assessment as well as why we are doing it. 1998 was the last time we sent out an assessment, so we want to ensure that the product we send out serves our staff, TCs and field trainers. There is also confusion over the approach we are taking. Should we be looking to identify competencies for each category to be successful? Is there a gap we are trying to fill? Is there a lack of resources or a lack of training? Ms. de Loera has come to the conclusion that we need to table this discussion for now as we are not ready to move forward. We need to decide what the end product should be and who are we trying to serve. Do we even need to do a survey? What is a needs assessment actually? All of the members agreed with the decision to table for now. The first order of business is to gain agreement on what an assessment would look like, what form it should take, and what we are going to do with this information. Mr. Schrade noted that we are looking at a complex set of staff: 6500+ staff, 161 court locations, different duties and levels of courts, management and management structures. Amongst all this messiness are differing needs. A needs assessment attempts to find common ground in all the staff. We will always need training and we always have the minimum 16 hour COJET requirement every year. The benefit of the needs analysis is that we get to decide what we are going to fill this 16 hours bucket with. Staff will typically choose what they want to attend which does not necessarily correlate to what their educational needs really are. TCs at every court are not always trainers themselves but they have the responsibility to organize and set the agenda for training as well as track compliance. A needs analysis will provide the branch with a direction to program to. What are the main competencies that we need to align our training with? Bottom line is to get the TCs to make intelligent decisions about what types of training need to be offered in their

courts; like a political science major has to look at the range of classes offered that would satisfy his/her degree requirements. We need to look at where we are now, where we want to go and what is the gap in between? There is a benefit to having a focus for each year; for example, implicit bias is more or less the same class no matter where it is taught. Maybe we should focus on a few areas each year. A new assessment gives us the opportunity to learn the same things across the state. Maybe we should look to other courts in other states/counties who are in our position for insight. NASJE (National Association of State Judicial Educators) has a list serve and curriculum design on needs assessment. What needs are we really trying to measure here? Job titles are one of the obstacles we face – the same job title may have different needs. People wear different hats so this needs to be looked at. If the goal is to get somewhere, shouldn't we first look at where we are now? Where are the gaps? If we teach everyone to teach they can fill in their own gaps. So do we go macro or micro? Ms. Sapra suggested that we start small with a basic questionnaire that would be sent out to all TCs and court staff – what skills, knowledge and abilities do you need? Our expectation is that we get a list of skills, knowledge and attitudes that will assist employees to be better in their job.

- i. After much discussion, it was suggested that we put together a list of what is needed for the first two years of a job then create packages for each job type (knowledge, skills and abilities). Members are to come to the next meeting with a list of skills, knowledge and abilities needed to be successful in each job represented by JSEC members including the wearing of two hats if that is applicable. Ms. Weigand and Ms. Schaben volunteered to look at overlaps, commonalities and approaches. Please don't wait until October but get your lists in as soon as possible to get specific job responsibilities to Ms. Sapra by September 1. Include very basic things ethics, diversity, etc.

7. Proposed Meeting Dates:

- a. Friday, October 7 – don't forget to please let ESD know if you will or will not be attending!

8. New Business and Call to Public:

- a. No public answered

9. Set Action Items for Next Meeting:

- a. Needs assessment survey update– Ms. Weigand and Ms. Schaben
- b. BLSC topics and faculty suggestions – Ms. Sapra
- c. E² Resources update – Mr. Cornay

10. Adjourn: Meeting was adjourned at 1:08pm

DRAFT